

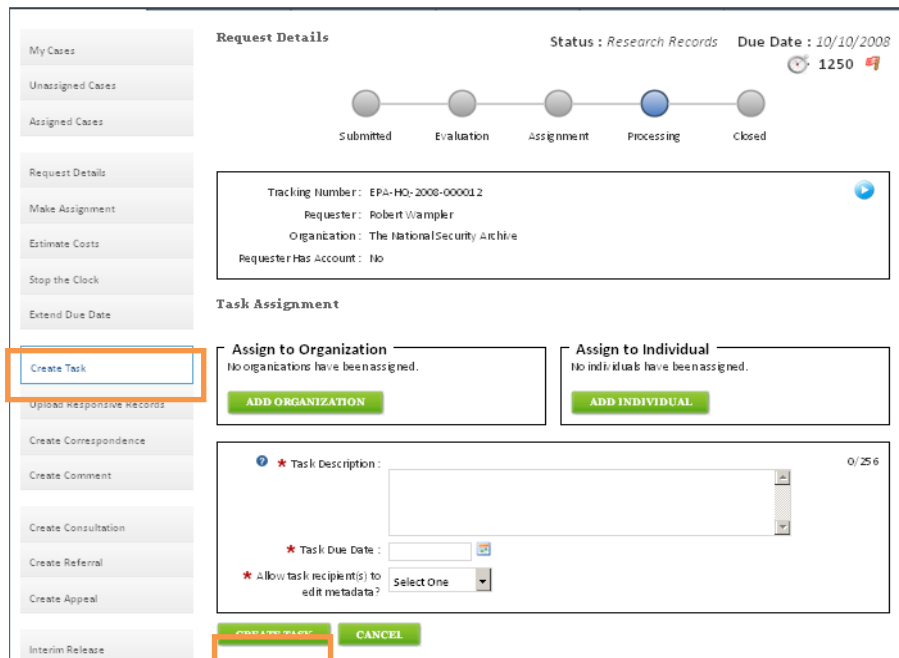
Quick Reference Guide FOIAonline

How to Create a Task

This Quick Reference Guide provides instructions for creating a task in FOIAonline. When you create a task, you request records from another individual or organization that support processing the FOIA request; however, the request (i.e., case) is still assigned to you. (A task allows someone not assigned the case to complete an action in support of processing the request (e.g., make a fee waiver determination, upload responsive records)).

1. Click on the gray **Create Task** button on the left navigation bar.
2. Type any necessary instructions in the **"Task Description"** box. Please note, there is a 256 character limit.
3. Select a due date under **"Task Due Date."**
4. Determine if the task recipient may edit the metadata by selecting from the dropdown options.
5. Click the green **Create Task** button.

Figure 1: Request Details



The screenshot displays the 'Request Details' page in FOIAonline. On the left is a navigation bar with buttons: 'My Cases', 'Unassigned Cases', 'Assigned Cases', 'Request Details', 'Make Assignment', 'Estimate Costs', 'Stop the Clock', 'Extend Due Date', 'Create Task' (highlighted with an orange box), 'Upload Responsive Records', 'Create Correspondence', 'Create Comment', 'Create Consultation', 'Create Referral', 'Create Appeal', and 'Interim Release'. The main content area shows a progress bar with stages: Submitted, Evaluation, Assignment, Processing (active), and Closed. Below this, a box contains request metadata: Tracking Number (EPA-HQ-2008-000012), Requester (Robert Wampler), Organization (The National Security Archive), and Requester Has Account (No). The 'Task Assignment' section has two boxes: 'Assign to Organization' (No organizations have been assigned, with an 'ADD ORGANIZATION' button) and 'Assign to Individual' (No individuals have been assigned, with an 'ADD INDIVIDUAL' button). The 'Task Description' section includes a text area (0/256 characters), a 'Task Due Date' selector, and a dropdown for 'Allow task recipient(s) to edit metadata?'. At the bottom are 'CREATE TASK' (highlighted with an orange box) and 'CANCEL' buttons.



When a task assigned to an individual or organization is closed, you will be notified via email from FOIAonline.